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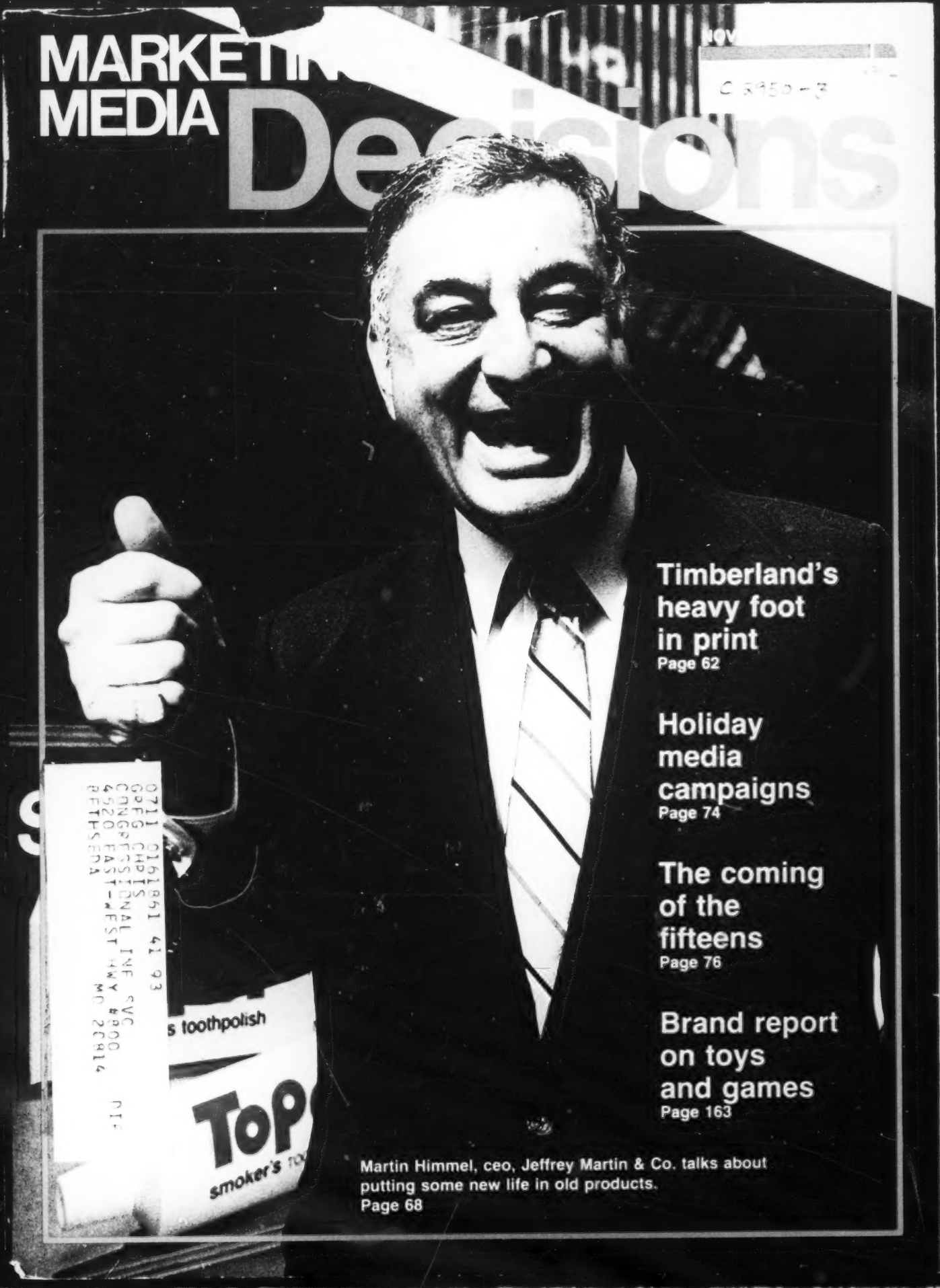
MARKETING
MEDIA Decisions



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accurate possible selection of a very special consumer audience."

Applevision produces half-hour programs using a newscast format that allows for natural breaks for commercials. Segments on restaurants and theaters are included.

Cable/telephone charges fly

Cable is no threat to the telephone companies in terms of revenue, says Tom Wheeler, president of the National Cable Television Association. Wheeler contends that if the phone companies win their battle in Congress to crimp cable's ability to deliver information that the consumer "will be the loser."

A NCTA white paper contends that phone companies have claimed falsely that local phone rates will escalate if cable provides data transmission services. According to the white paper, "Barely 1.1% of the Bell System's revenues are derived from data transmission.

"Even if cable took over the telephone company's entire data transmission market (an unlikely occurrence — cable carries less than two tenths of one percent of data transmissions) the effect on consumer phone rates would be virtually nill.

"The threat to raise local phone rates is a smoke screen by the telephone companies to hide their real motive — to stifle cable and other technologies which offer consumers a choice of services."

The Senate, earlier this year, adopted the Cable Telecommunications Act, which rejects the phone companies' position. It allows state PUC's to require cable companies offering data transmission services to fine informational tariffs and, when competition for data transmission services develops in a given market, the states are instructed to deregulate the telephone companies. The House Commerce Committee is to consider a cable bill this fall.

Cable Subscriptions

Company	Basic Subs	Market Share
Tele-Communications, Inc.	2,275,000 (PKA est.)	7.7%
Time Inc. (ATC)	2,248,500	7.6
Westinghouse (Group W)	1,911,300	6.4
Cox Cable	1,371,000	4.6
Warner Amex	1,340,000	4.5
Storer	1,279,000	4.3
Times Mirror	844,600	2.8
Rogers/Rogers UA	768,700	2.6
Newhouse	736,600	2.5
Continental	679,000	2.3

Who's got the cable subscribers?

A list of the top 50 MSO's has been compiled by *Cable TV Investor*, and it shows that the top 50 hold 75% of the nation's 29.7 million cable subscribers. The Paul Kagan newsletter also shows that the top 10 operators account for almost half the total subscribers, 13.5 million, or 45%.

The top 25 MSO's hold a 63% market share. By comparison, two years ago, the top 25 held a 58% share, so its a case of the big getting bigger. The biggest system operator of the lot is Tele-Communications, Inc. with 2,275,000 subscribers. Above is a list of the top 10.

TeleFrance says au revoir

TeleFrance-USA has ended its French language cable feed in the U.S., ending seven years of service that started in New York City. The decision was made after it was discovered that cuts in service were impending.

Jean Vallier, ceo, program director, TeleFrance, announced the decision was motivated by financial difficulties, due to lack of sufficient advertising revenues. Although efforts were made in the previous two months to secure additional support for the culturally oriented French program, mostly from the French government, these efforts failed to produce results. TeleFrance programing was carried nationwide via satellite by the Satellite Program Network, in primetime.

Pay tv revenues estimated

By 1993, the U.S. cable tv population is expected to reach 60% of all households, according to projections from cable analyst Paul Kagan. He estimates the number of cable homes then will stand at 60 million as compared with 100 million tv homes.

By that time, Kagan estimates there could be as many as 104 million pay-cable subscriptions being sold to viewers for such services as Home Box Office, Showtime, The Movie Channel, and The Playboy Channel.

Combined revenue from all sources, according to Kagan, may approach $32 billion, compared to $6 billion in 1983.

Looking ahead 10 years, Kagan foresees the average cable subscriber putting as much as $34 a month into pay services. But, he adds, for that investment, the subscriber will receive triple the number of program services.

"Cable tv prices don't keep pace with inflation. But by selling more services to more subscribers, the cable operator can still profit."

Convention Center, includes room for seminars and demonstrations.

Manufacturers pay $5 per square foot, which will be fed into the $1.2 million ad budget for the first year. According to Alan Chernoff, vp, marketing for the center, media is a tricky proposition.

Targeting will be both horizontal — to New York city residents and visitors — and vertical — to specific seminar attendees. Advertising will be primarily print, using trade publications and consumers print — like *Business Week* and the *Wall Street Journal* to reach professionals within their own publications.

"An important part of the marketing strategy," Chernoff notes, "will be the on-going seminars, co-sponsored by New York University and CW Communications." Promotion for the seminars will be on a direct-mail basis.

Costs will vary with the costs of different trade books, he says, adding that the strategy will remain the same for each professional category targeted.

"We are trying to be end-user oriented," he concludes, comparing the efficiency of the center with the price competition and equipment form of competition the industry has favored until now.

Positive outlook for international markets

As the U.S. economy gathers steam, effects of the recovery have already been felt abroad, according to an analysis by Predicasts, the Cleveland-based research firm.

T. Kevin Swift, the firm's chief economist, finds that Canada, South Africa, Japan and Singapore all show signs of U.S. prompted growth. These are countries with which the U.S. has a significant trade volume. The developing countries, on the other hand, which include the Africa-Mideast region, Latin America, Asia and Oceania, have not fared as well. Problems in these areas are attributed to the infrastructure, poor socio-economic climates and high debt service requirements.

Despite this imbalance, the research firm finds signs of overall growth for the late 1980's and 1990's. Growth in the developing nations will hinge on trade in raw materials, manufactured goods and services, according to Swift. Prospects for growth will be hampered by socio-political unrest, stimulated by an increasing labor force the world labor market will be increasingly unable to absorb.

Consumer spending will be a factor of greater leisure time, an aging population and saturated durable goods markets. This will lead to an increased expenditure on services, which is unlikely to affect the developing nations.

World economic outlook by country and region

(billion 1975 dollars)

ITEM	1982	1987	1995	% Annual Growth 82/87	87/95
Gross World Product	**7715.3**	**9103.0**	**12140.0**	3.4	3.7
North America	**1999.2**	**2424.0**	**3185.0**	3.9	3.5
United States	1811.9	2195.0	2875.0	3.9	3.4
Canada	187.3	230.0	310.0	4.2	3.8
Latin America	**485.6**	**567.5**	**811.1**	3.2	4.6
Brazil	176.0	210.0	310.0	3.6	5.0
Other Latin America	309.6	357.5	501.1	2.9	4.3
European Community	**1623.7**	**1840.9**	**2315.9**	2.5	2.9
France	404.9	450.0	570.0	2.1	3.0
Italy	230.2	267.0	345.0	3.0	3.3
United Kingdom	248.7	280.0	345.0	2.4	2.6
West Germany	490.8	560.0	695.0	2.7	2.7
Other European Community	249.1	283.9	360.9	2.6	3.0
Non-EC Western Europe	389.5	437.3	570.0	2.3	3.4
Eastern Europe	**1305.8**	**1505.0**	**1956.0**	2.9	3.3
USSR	932.9	1070.0	1375.0	2.8	3.2
Other Eastern Europe	372.9	435.0	581.0	3.1	3.7
Africa/Mideast	479.5	572.5	806.5	3.6	4.4
Asia	**1310.7**	**1618.8**	**2317.5**	4.3	4.6
China	263.6	350.0	560.0	5.8	6.1
Japan	673.6	805.0	1085.0	3.6	3.8
Other Asia	373.5	463.8	672.5	4.4	4.8
Oceania	121.3	136.0	178.0	2.3	3.4

Source: Predicasts, Inc.; Cleveland, Ohio

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Verification made easy

Agencies and clients have longed for iron-clad verification of television and radio commercials for as long as electronics have been around. The answer to their prayers may be on the horizon, in the shape of an electronic system pioneered by Audicom Corporation.

Robert P. Engelke, president Audicom Corporation.

Though there is a residue of skepticism from industry observers that have seen "verification" systems come and go over the past decade.

Based on a concept originally offered in 1968, the 1983 version uses audio signals imperceptible to the human ear to monitor stations for encoded commercials, automatically reporting data to a central computer. According to the company's president and founder, Robert P. Engelke, the system offers positive proof of performance. Any material to be aired can be verified without involving estimators.

Engelke, a media specialist with experience at Ted Bates, Jack Tinker & Partners, and Wells, Rich, Greene, pointed to the applications of the system in the broadcast industry during a speech made at the introduction.

Not only will the billing process be accelerated, but make-goods and missed commercials will be routinely handled.

The Audicom system will also have application for checking on the use of any copyrighted material that airs — record or tape piracy, and computer fraud.

Engelke's announcement of the product's introduction coincided with his application to the Federal Communications Commission for authorization to put the system to use on the air waves. Tests have already been done with the device, over tv network land and satellite, local tv and FM radio. He said he expected the system to be introduced in its first market, New York, within the next six months.

The dawning of the age of robots

A recently released survey, the Merit Report, found that most members of business and industry favor increased use of automation, though they feel it will worsen the employment situation.

More men than women (62% to 48%) favored automation. Overall, 55% of respondents favored the advanced technology, while 28% opposed it. Technology received a more positive response among the young (63% in the 18-34 group; 47% in 50+) and among the affluent (66% for incomes of +$125,000, as opposed to 52% in the $15,000 range).

On related subjects, concern over job losses shows a high correlation by groups with the response on automation. Women were more likely to link technological advances with job losses (48% vs. 40%), as were the older participants (48% vs. 38%) and the less affluent (52% vs. 38%).

The survey was conducted in the third week of September, among 1,205 adults interviewed over the telephone, and was sponsored by Merit cigarettes.

American Demographics, the Ithaca-based publication, has recently released its predictions on the anticipated changes in Congress, based on projections of state population growth figures. The data took as base figures recently released by the United States Census Bureau.

According to American Demographics, New York will lose five Congressional seats, and Texas and Florida will each gain four by 1990.

California and Arizona are both expected to gain. Arkansas, Colorado, Georgia, Oregon, Utah and Washington are to lose one seat each. The shift in population will mean that the Sunbelt constituency will dominate the country, according to Bryant Robey, editor of the publication.

Congressional Seats by Region: 1980 and 1990

	1980	Projected for 1990*
Northeast	95	84
North Central	113	105
South	142	152
West	85	94

* by American Demographics, based on Census Bureau population projections.

International Resource Development, the Norwalk based market research firm, released a study predicting that American Telephone & Telegraph will introduce a microcomputer system within the next six months.

Combining longer word length architecture with software based on Bell Laboratories' Unix operating system, the AT&T system is expected to rival — and even "upstage" — the IBM PC. The report said the system will have to be able to use software developed for the IBM PC, "In order to successfully enter the microcomputer market at this relatively late stage."

In the past, the study reports, AT&T's software was hampered by the absence of general white collar productivity improving tools. The projected system will focus on increasing productivity of specific work sectors such as writing or computer programming. This discipline-specific focus will differentiate the system from others.

The ABC's of videotex/teletext

How many industry practitioners truly understand the new electronic media — NEM for short? Two of the more prevalent forms getting underway are videotex and teletext. Just what are they? What is the difference between the two? What companies are underwriting either form? When will they be viable advertising media?

Introduction

The New Electronic Media represents one of the major industries of the future and it is growing at an explosive rate. Electronic media forms such as cable, videotex, teletext and home information systems all compete for market share and potential revenue. Competition is intense among suppliers of delivery systems, such as AT&T and IBM, for revenue generated by the use of their equipment. Creators of marketing and financial programs for new electronic media, such as CBS and Time, Inc., also compete for that market share — but from a different perspective.

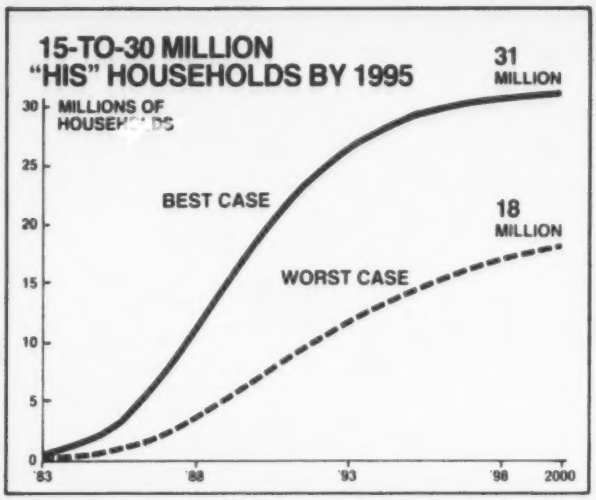
However, advertisers and their agencies have taken a more cautious approach. Faced with a variety of advertising vehicles, they are reluctant to commit to the new electronic media as a forum for their products. There are a few reasons for this hesitation. The first is that while the technology is here, the marketplace is not. There is confusion about — and varying forecasts of — the market and revenue potential. Second, basic questions arise such as:

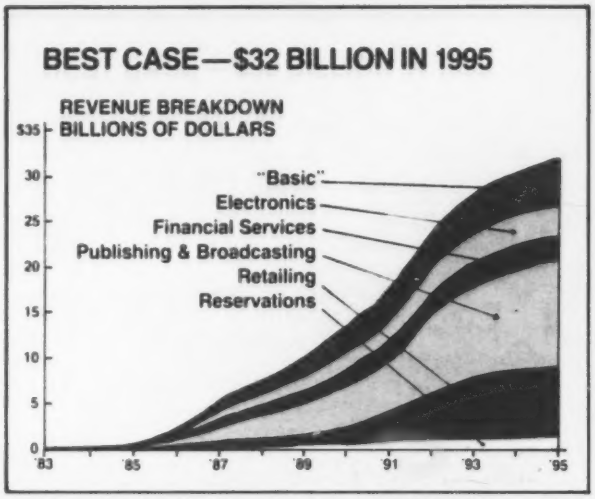
- Does the consumer really want information in an electronic format?
- How will the services be priced?
- Will the consumers be willing to pay those fees?

The fourth, and most critical question for the advertising community, is what is the advertising effectiveness? Thus, advertisers remain only occasional participants in experiments.

This series will address two of the new electronic media vehicles — videotex and teletext. It will define what they are. It will describe how they work. It will list the major corporations involved in tests and describe their strategic reasons for that involvement. The tests that have been conducted or are planned for the near future, their advertising potential as media choices, and the systems available for measuring their effectiveness, and other areas that will be developed by practitioners in these media.

Vivienne Vilardi has had a broad range of assignments in the marketing, sales and planning of telecommunications, cable and video applications, including home banking, home shopping, product advertising and direct response programs. As a consultant for Simmons Market Research Bureau, she developed sales strategies and targeted markets for a new database information product with eventual links to home/corporate information systems. While at Young and Rubicam, Inc. as project director for Venture One, she managed the first phase, coordinating all aspects for Young & Rubicam, Inc. and clients General Foods and Johnson & Johnson. She is currently director of Planning & Business Development for Pollio Dairy Products and is teaching a course on Videotex and cable applications at the New School in New York City.





How many homes will be receiving and using electronically generated information by 1995? Chart at left shows high and low probabilities. Chart at right shows revenue breakdown for best case scenario.

Videotex and Teletext: What they are and how they work

Videotex and teletext represent two different methods of communicating information.

Videotex generally refers to computer services that display textual and graphic information on remotely located video screens, usually personal computers or specially adapted television sets. These terminals are linked to a central host computer, which stores the information, by a telephone acting as a modem. This device converts the analog signals transmitted by telephone lines into digital signals that can be read by the videotex terminal.

Another method of receiving videotex services is by a cable network. A decoder box that sends and receives videotex signals can be built into a television set during its manufacture. Or, it can be attached to the outside of the television set and connected to the antenna terminals. Videotex can be carried over optical fiber and also transmitted by satellite.

Because the technology allows the consumer to both receive from and send information to the central host computer, videotex is considered a two-way or interactive system.

How does videotex work? The consumer can access the information or services in two ways, either by a "tree structure" or a keywork technique using a numeric keypad or a keyboard. The tree structure includes a broad subject index page or main menu frame similar to a table of contents. From this main menu, a consumer can narrow down his choice from a list of selections by pressing the designated key on the keyboard. Thus, the user can move directly to certain locations in the tree structure and immediately receive or send information.

Teletext information, sometimes referred to as broadcast videotex, is an over-the-air electronic broadcast product displaying text and graphics on demand. Teletext is transmitted over the vertical blanking signal (the black bar visible on a television screen when the tv image begins rolling up and down). There are 525 lines in the tv signal, line 1 through 21 constituting VBI. Information to be broadcast is digitally encoded at a central point and transmitted to a diffuser at a tv station. This acts as a storage device for over 100 pages of information. A multiplexer inserts all the information into the VBI of the station's broadcast and simultaneously transmits it with the broadcasts. The viewer uses a special decoder with a keypad selecting the desired information by pressing the page number. Teletext can also be transmitted by cable television or sent on a subcarrier of an FM or television broadcast signal.

While this form of data transmission is one-way, there is a hybrid system that allows for two-way communication. It consists of a one-way broadcast signal to a teletext receiver with return communications through a telephone. In that instance, the teletext decoder functions as an interactive videotex terminal by sending information back to the host computer over phone lines.

Videotex and Teletext: The players

Many companies from various industries are spending millions of dollars to develop videotex and teletext services. While most aim these services at the home user, until recently, they had not been able to determine whether or not there would be a sufficient market for such services. In a study conducted by Booz-Allen for 28 companies interested in determining market potential, the management consulting firm predicts that there will be a healthy videotex market. The study estimated that by the mid-1990's, 30 million households will have home information systems, making it a $30 billion industry in annual revenues for banks, retailers, advertisers and ad agencies.

Michael J. McLaughlin, the vice president at Booz-Allen who headed the Home Information Systems study, divided that figure into the approximate categories:

- $8-10 billion in advertising revenues;
- $8 billion in retailing;
- $6-8 billion in electronics;
- $2.5 billion in revenue for home banking;
- $1 billion in telecommunications revenue.

"These projections depend on a fairly complex equation of penetration

Continued on page 112

One of the more unique, in my opinion, is the bus stop shelter. Besides offering advertising exposures on major surface arteries, the same structure performs the dual purpose of providing shelter from the rain, sun and wind to waiting bus riders or anyone else in search of cover. It also provides a modicum of nocturnal security for the evening rider by virtue of its welcome illumination. Indeed, if it weren't for the humanitarian benefits there would be no medium at all.

Shelters were introduced in the United States in the mid-70's with Manhattan as the starting point. This was an excellent place to start, and Manhattan will always be the ideal market because of the throngs of pedestrians which swell the normally heavy vehicular audience to unusual heights. The medium experienced some early growing pains and was rather slow to expand. They did add markets such as Cleveland, Newark, Westchester and Louisville, but there was still no semblance of national coverage.

And adding markets always requires the blessing of the city fathers and accord by the majority of the city council. While, on the surface, it may seem like a welcome addition to any market, there can be, and often are, delays due to the vagaries of politics. But despite these hurdles the medium has slowly grown to the point where it now offers availabilities in approximately 25 major markets.

In addition to the aforementioned markets, the medium is now also available in Minneapolis, Miami/Miami Beach, St. Louis, Buffalo, Cincinnati, New Orleans, Chicago Suburbs, Philadelphia, Providence, Oklahoma City, Tulsa, Nassau County, Ft. Wayne, Waterbury, Stamford, Norwalk, Hartford, Los Angeles and Orange County. We also understand that franchises have recently been granted in Cook County and Washington, D.C.

In total numbers there are some 3,500 shelters in the U.S. and about 3,400 in Canada where the medium has enjoyed considerable success. It has even gained a foothold south of the border where metal shelters are available now in Mexico City, Acapulco and Tijuana.

According to Connie Barry, of Transtop Minnesota, the greatest single year of growth was in 1981. Ms. Barry, who doubles as president of the Shelter Media Association, is enthusiastic about the strides which have been made since the Association was formed in August 1982. She refers to 1982-83 as years of organization . . . getting ready for the next surge of expansion.

Part of that organization was to engage the services of an audit organization, Out-Of-Home Measurement Bureau. Auditing practices were drawn up and actual auditing has commenced. At this writing, some nine markets have had audits with more yet to come. Results of the audits show that the medium offers potential exposures at a cpm that ranges between 25 and 71 cents. Average cpm for all markets audited is approximately 38 cents. This is a favorable figure and an important sales tool for the medium.

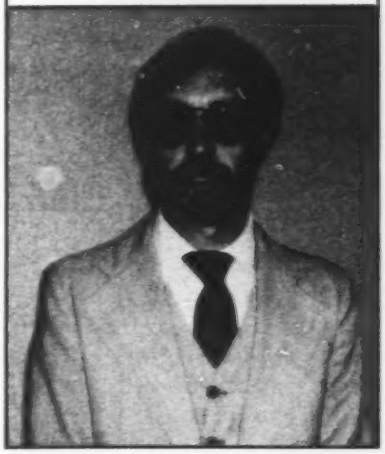
Another benefit that has come out of the Shelter Association is a study by Elliot Young's Perception Research which did a recall study on the streets of Philadelphia interviewing pedestrians one and a half blocks after they had passed a shelter advertisement. Twenty-one percent of the pedestrians remembered seeing the ad when asked; and thirty-seven percent remembered seeing the ad when reminded of the copy.

With the audits well under way and the stature that comes from acceptable research, all that remains is to sell the space. Toward that end, several of the Association members (16) have now hired the services of a national sales organization, Mutual Shelter Advertising, to represent them in New York City.

Sales have been good, but like any medium, it takes time. Perhaps the largest single advertising expenditure has been by Brown and Williamson for Kool cigarettes and for their Barclay brand. Among other national advertisers who have gotten their feet dry are Lorillard with Golden Lights and Kent III; Windsor Canadian; Gilbeys; Kentucky Tavern; Remy Martin; Budweiser and Coca Cola. *Penthouse*, *Playboy* and *Women's Day* along with *USA Today* and *The Wall Street Journal* are among the other media that advertise on shelters.

As the medium grows, it will undoubtedly become more attractive to a broader range of advertisers. Meantime, it looks like they've got their act together. If you're interested in further information, call Connie Barry at the Shelter Media Association in Minneapolis. ■

MAGAZINES
By TOM JOHNSON
associate media manager
Compton Advertising, Inc., Detroit



Magazine selection and lifestyle

The Jeep Cherokee and Wagoneer are the first brand-new Jeep products in 20 years. They enter the new truck segment of compact sport utilities currently occupied by the successful Ford

	Median Age	Median Income	% White Collar	% Attended College +
Standard Pickup	45	$29.5m	30.2%	36.8%
Compact Pickup	36	29.6m	41.2%	56.1%
Utility Vans	43	34.7m	53.4%	57.5%
Sport Utility	37	37.6m	52.0%	60.8%

90.4%

Personal written request.

That's what Marketing & Media Decisions scored in last December's BPA statement.

Can they do it again this December?

Wait and see.

Bronco II and GM's S-10 Blazer and S-15 Jimmy. Compton-Detroit's approach to magazine planning for this category uses a unique formula based upon demographics and lifestyle to target in on potential buyers.

The most frequent assumption by people *not* in the truck marketing business is that a truck is a truck. Differences among a pickup, van or sport utility truck may seem virtually negligible; however, a close examination of the buyers of these vehicles reveals significant differences.

The truck market is segmented just like the car market. A sport utility buyer is as different from a standard pickup buyer as a sportcar buyer is from a standard size car buyer.

A quick review of buyer demographics illustrates the differences among truck buyers, by segment:

As the demography illustrates, truck segments vary in appeal by demographic characteristics. For example, the sport utility market is the sportcar segment of the truck market, with upscale demographics.

Looking at the demographic profile of a sport utility customer, the usual image of a "truck" buyer in dirty blue jeans might well change to neatly pressed designer jeans. These differences would seem to help graphically target the various truck segments. The sport utility market accounts for merely one tenth of a percent of the total U.S. adults that will purchase a new sport utility in any given year. With those kinds of odds — and using a limited budget — the trick is to concentrate as much as possible on the .1%

To surpass the limitations of demography, you have to think in terms of what motivates a person to purchase a sport utility. While a specific reason cannot be identified, the overall motivation is image. Image is best displayed by the products you buy and the lifestyle you lead. Lifestyle is a reflection of the things you do; obviously a stamp collector conjures up a different image from a skier.

Lifestyle can be quantifiably measured through activities as reported in MRI and SMRB. Activities can be matched by demographics or by product purchases. Activity information overlayed with target audience demo-

"What really impressed them was that 92.5% of HBR subscribers are managers and professionals."

Harvard Business Review

New York, NY (212) 972-0740
Boston, MA (617) 495-6182

graphics build a complete profile of the sport utility buyer. This allows media to be selected which has psychographic implications that relate directly to both lifestyle *and* product.

That *doesn't* mean, however, that only books reflective of those activities be used. Concentrations of appropriate target consumers exist in publications that do not incur the cost premium of special interest publications. These are the publications that form the base for our magazine buys, supplemented by key special interest publications. Magazine selection by this criteria helps hold down target cpm, while getting concentrations of people with the right lifestyle for our product.

This technique will work equally well for any product which is image-related and which depends heavily on image for sale. Matching the media psychographically by activity as well as demographically, insures maximum effect of an image-oriented creative campaign.

MEDIA RESEARCH
By LARRY D. KELLY
Associate Media Director,
Bozell & Jacobs, Inc.

Infomercials

Put a media person and a creative person in the same room and what happens? Inevitably the efficiency versus impact argument takes place. Tradition has it that media folks prefer :30s to :60s in television and 2/3 page to a full page in magazines. This rationale is to gain that all important frequency. Creative people, on the other hand, seem to always want more time and more space to tell the story. It seems ironic, then, that media directors rate the optimum length of television commercials as being longer than that of their creative counterparts. Commercial lengths longer than :60 were rated as more effective by media directors than by creative directors. This finding was one of the highlights of a study funded by Bozell & Jacobs, Inc. and conducted by Dr. Richard Beltramini of Arizona State University to investigate the impact of infomercials on the advertising industry. Questionaires were sent to media directors, creative directors and advertising managers of the top 100 broadcast advertising agencies and advertisers. Four major research questions were addressed. Two involved general knowledge and use of infomercials. Infomercials here are defined as commercial units greater than :60 seconds. The other two questions dealt with perceptions of commercial effectiveness. It was here than the agency disciplines of media and creative had differing opinions.

The two questions addressed were:

- What do advertising professionals feel is the optimum length of commercials?
- What do advertising professionals feel is the relative overall effectiveness of various commercial lengths for products and services?

The overall average for the optimum commercial length was 40 seconds. Agency media directors reported that nearly 50 seconds would be ideal while creative directors felt that 39 seconds would suffice.

To explore this issue further, the respondents were also asked to report their feelings on the maximum length of a prime time commercial. Overall, the average was 65 seconds. Agency media directors reported longer, 73 seconds, while creative directors reported a much shorter than average 52 seconds. Both agency media directors and creative directors differed statistically from the overall average on this aspect. Here the overall results demonstrate advertising professionals' feeling that spots of approximately 40 seconds are optimum, and those of approximately 65 seconds are maximum. Agency media directors see longer than average levels while